Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain

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Contents

The next release is April 29, '04

Grain Truck Market Advisory Now Available: The U.S. Department of Agriculture (USDA) recognizes the important role of trucks in the grain industry from procurement and delivery to end-users. It is estimated that nearly one-half of the grain marketed in the United States is moved via truck. The new *Grain Truck Market Advisory* (GTAD) provides a window into this segment of national grain transportation. In the latest GTAD, the average U.S. grain truck rate is $1.95 per mile for the final quarter of 2003, a 4-percent decrease from the level reported for the previous quarter. Regionally, rates in the north central States increased by about 4 percent and decreased in the south central States by about 12 percent, compared with last quarter. Lower rates, nationally and in the south central region, are expected due to decreased demand following the third quarter harvest season. The small rate increase in the north central region is likely due to ongoing rail service problems and rising diesel fuel prices.

The GTAD will be issued quarterly. Information contained in the advisory is based on responses from elevators across 17 States. The top producing States, located in the north and south central regions of the United States, were selected based on their position as the largest volume producers of corn, wheat, and soybeans (National Agricultural Statistics Service, USDA). Elevators in nine top producing States have been designated by their State's grain and feed organizations as leaders in the grain truck market. Elevators are asked to report truck rate information for a local haul of 25 miles and longer distance trips of 100 and 200 miles, as well as the elevator's truck availability and current and expected levels of truck use, compared with the same period last year. The information contained in the advisory provides a snapshot of the current grain truck market and expectations for future activity. The ongoing system of data collection establishes a foundation for identifying longer term shifts and trends that will be valuable in addressing market, policy, and risk management issues related to this critical mode of grain transportation. We invite you to provide feedback regarding the *Grain Truck Market Advisory* to John.Batson@usda.gov.

Brazil Ports and Exports: The Port of Paranagua, the largest soybean export port in Brazil, has had long lines of trucks and ships again because of a strike 2 weeks ago. Although Reuters now reports that the lines are cleared, the port had been plagued by lines of trucks (approximately 53 kilometers long) and 27 ships waiting up to 15 days to load at $40,000-$50,000 per day in demurrage fees. The costly waits, controversial policies, and nonbiotech premiums that never surfaced in Paranagua have many exporters choosing to reroute exports to other ports including Santos and Rio Grande. In February, these two ports handled 64 percent of all Brazil's soybean exports, compared with 45 percent last year. Ships arriving at the privatized port of Santos only wait 2 days, compared with Paranagua, which is government owned. The Port of Santos forecasts it will export 12 million metric tons (MMT) of soybeans and products this year, compared with 8.4 MMT last year, equaling Paranagua's exports last year. Brazil is expected to export 23.5 MMT of 2003/04 soybeans, which is 37.5 percent of world trade. The United States is projected to export 24.49 MMT of 2003/04 soybeans, which is 39 percent of world trade. USDA, FAS, *Weekly Market Report: Oilseeds, April 16, 2004;* USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates, April 8, 2004*; *Reuters*, April 18, 2004.

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean Gulf	Ocean Pacific
04/21/04	115	196	78	320	294
Compared with last week	↑	↑	↓	↓	↑

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

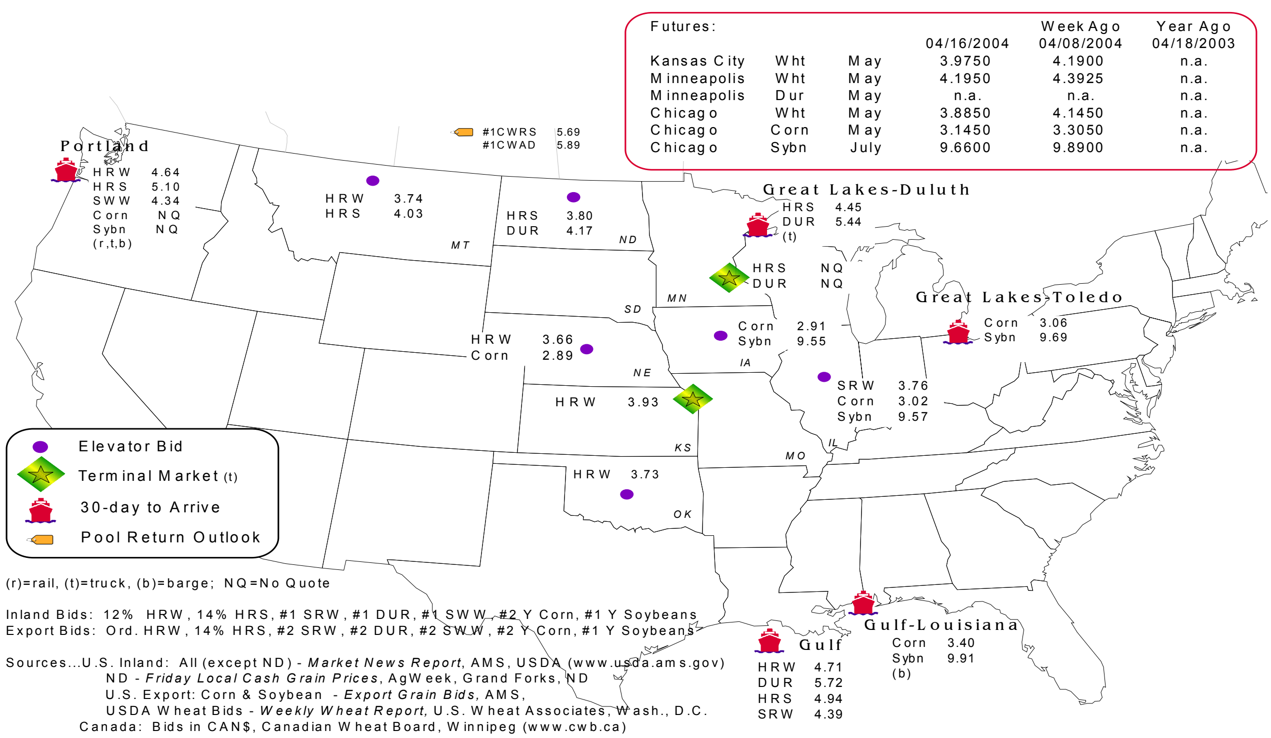
Commodity	Origin--destination	4/16/2004	4/8/2004
Corn	IL--Gulf	-0.38	-0.39
Corn	NE--Gulf	-0.51	-0.48
Soybean	IA--Gulf	-0.36	n/a
HRW	KS--Gulf	-0.78	-0.79
HRS	ND--Portland	-1.30	-1.22

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain bid summary



Rail Transportation

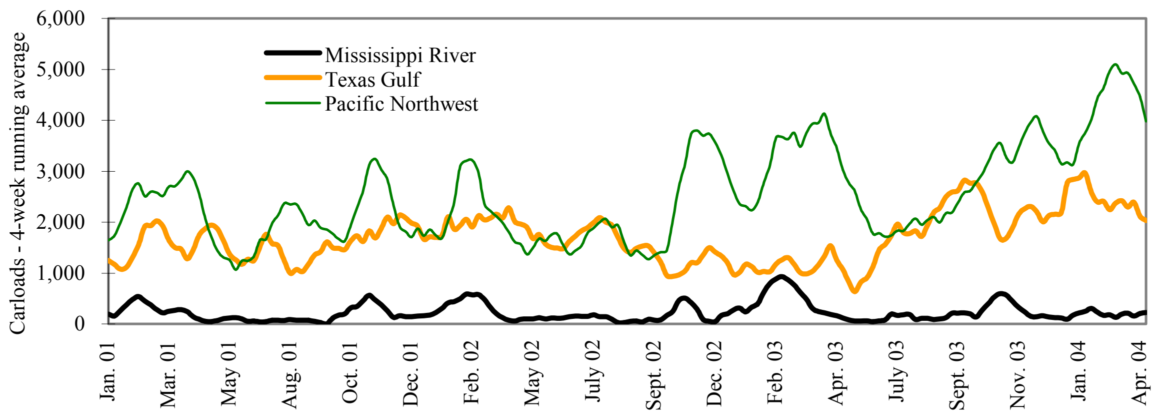
Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
4/14/2004 [p]	376	1,808	2,732	60	4,976
4/07/2004 [r]	379	1,741	4,047	0	6,167
2004 YTD	3,209	36,314	63,296	3,387	106,206
2003 YTD	7,906	17,664	51,569	8,615	85,754
2004 as % of 2003	41	206	123	39	124
Total 2003**	14,934	88,118	150,530	20,509	274,091
Total 2002	10,937	84,625	111,832	20,842	228,236

(*) Incomplete Data; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data
Source: Transportation & Marketing Programs/AMS/USDA

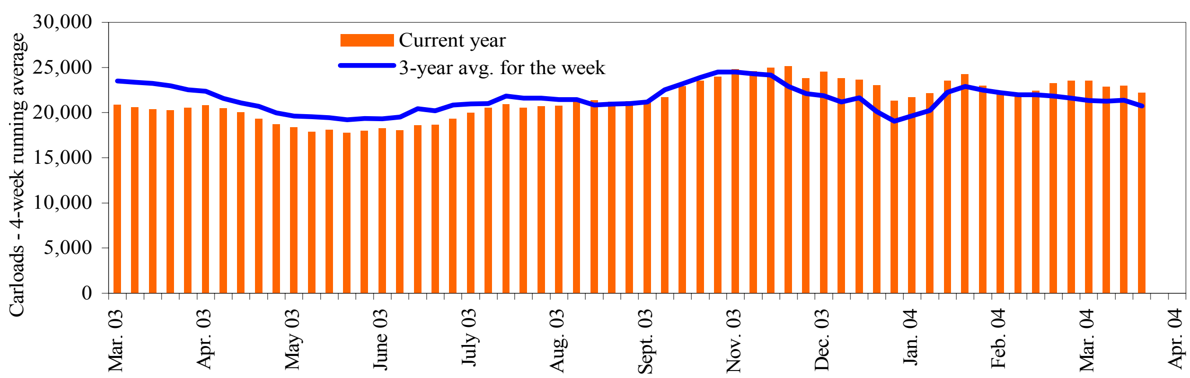
Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3
Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
04/10/04	2,311	3,113	9,107	334	5,770	20,635	4,674	3,690
This week last year	2,573	2,676	7,364	309	6,494	19,416	3,762	4,496
2004 YTD	41,575	47,192	132,386	7,705	93,184	322,042	65,822	48,822
2003 YTD	40,575	45,353	110,947	4,936	91,368	293,179	48,226	49,810
2004 as % of 2003	102	104	119	156	102	110	136	98
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings ($/car)*

Delivery for:	May 04	June 04	July 04
BNSF[1]			
COT/N. grain	no offer	no offer	no offer
COT/S. grain	no offer	no offer	no offer
UP[2]			
GCAS/Region 1	no offer	no offer	no offer
GCAS/Region 2	no offer	no offer	$58

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

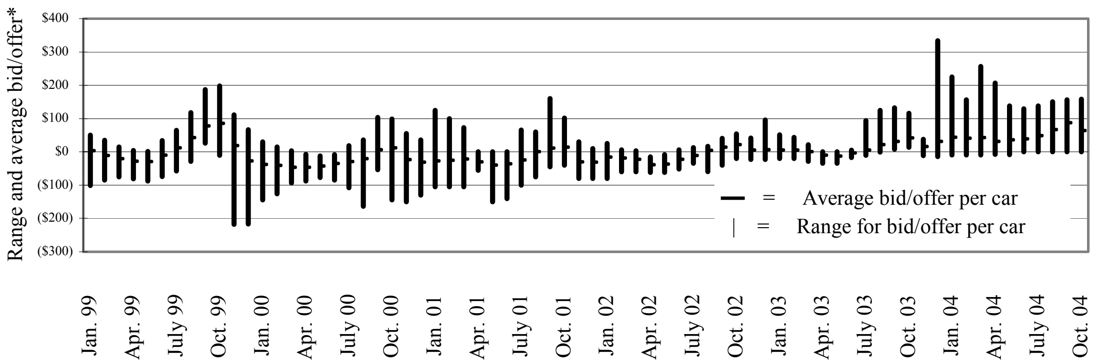
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Secondary rail car market, delivery month-year



*up to 6 months of trading
Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market ($/car)*

	Delivery period			
Week ending	**May 04**	**June 04**	**July 04**	**Aug. 04**
BNSF-GF				
4/16/2004	$63	$65	$76	$105
Change from last week	$17	$14	$18	$4
UP-Pool				
4/16/2004	$138	$118	$138	$150
Change from last week	$2	-$11	$7	$12

*Average premium/discount to tariff, $/car-last week
Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool
Sources: Transportation and Marketing Programs/AMS/USDA
Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

Effective date: 4/5/2004	**Origin**	**Destination**	**Rate/car**	**Rate/metric ton**	**Rate/bushel****
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,020	$22.27	$0.61
	Kansas City, MO	Galveston, TX	$1,820	$20.06	$0.55
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$1,945	$21.44	$0.58
	Kansas City, MO	Laredo, TX	$2,280	$25.13	$0.68
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$1,961	$21.62	$0.59
Corn	Minneapolis, MN	Portland, OR	$3,240	$35.71	$0.91
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,170	$23.92	$0.61
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.52
	Council,Bluffs, IA	Stockton, CA	$3,496	$38.54	$0.98
	Kansas City	Dalhart, TX	$1,745	$19.24	$0.49
	Columbus, OH	Raleigh, NC	$1,750	$19.29	$0.49
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,310	$36.49	$0.99
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.55
	Chicago, IL	Raleigh, NC	$2,441	$26.91	$0.73
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,795	$19.79	$0.54
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,425	$26.73	$0.68
	Minneapolis, MN	Portland, OR	$3,090	$34.06	$0.87
Soybeans	Council Bluffs, IA	Houston, TX	$2,255	$24.86	$0.63
	Minneapolis, MN	Portland, OR	$3,110	$34.28	$0.87

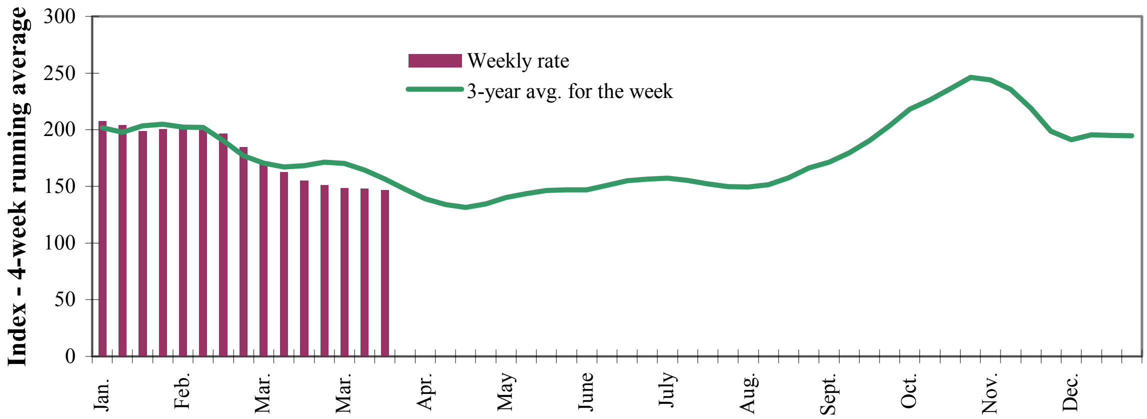
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Barge Transportation

Figure 5
Illinois River barge rate index - quotes



Note: Index = percent of tariff rate

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	4/14/2004	4/7/2004	May '04	July '04
Twin Cities	180	185	183	189
Mid-Mississippi	151	153	152	164
Illinois River	146	147	196	156
St. Louis	115	117	121	134
Lower Ohio	116	118	122	139
Cairo-Memphis	110	111	113	128

Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6
Benchmark tariff rates

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

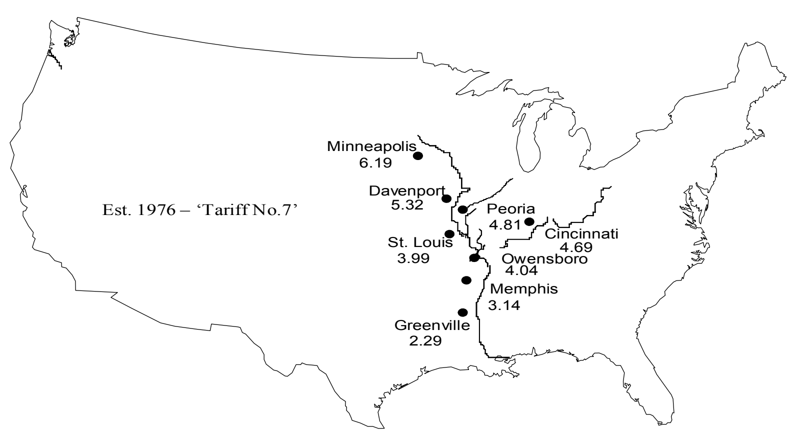


Table 9--Barge futures market (US$)*

Week ending	River/region	Contract period	Index rate Futures	Index rate Cash
4/20/2004	St. Louis	May	n/a	130
		July	n/a	145
		Sep.	n/a	205
		Nov.	n/a	180
		Dec.	n/a	153
	Illinois River	May	n/a	143
		July	n/a	153
		Sep.	n/a	220
		Nov.	n/a	215
		Dec.	n/a	180

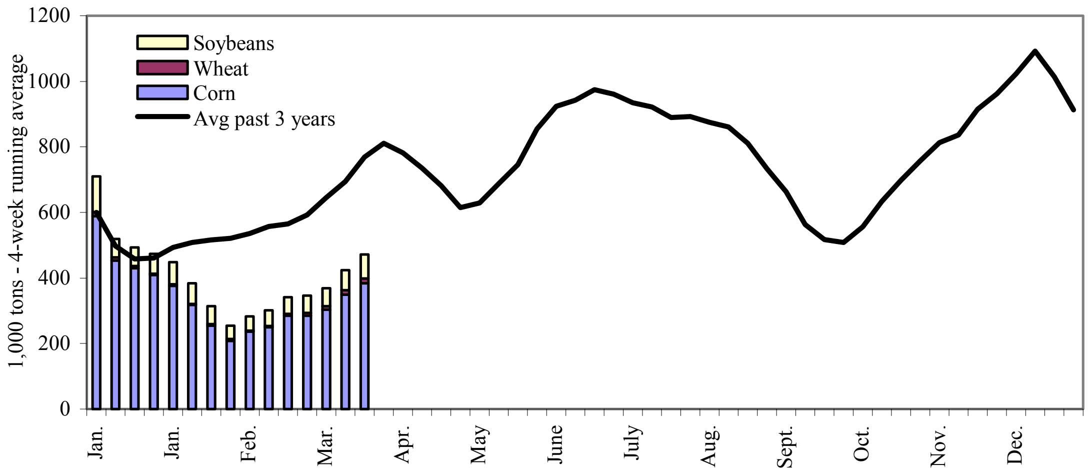
*Southbound barge freight nominal/cash basis values (US$)

Note: Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Merchants Exchange of Chicago (www.merchants-exchange.com)

Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 10--Barge grain movements (1,000 tons)

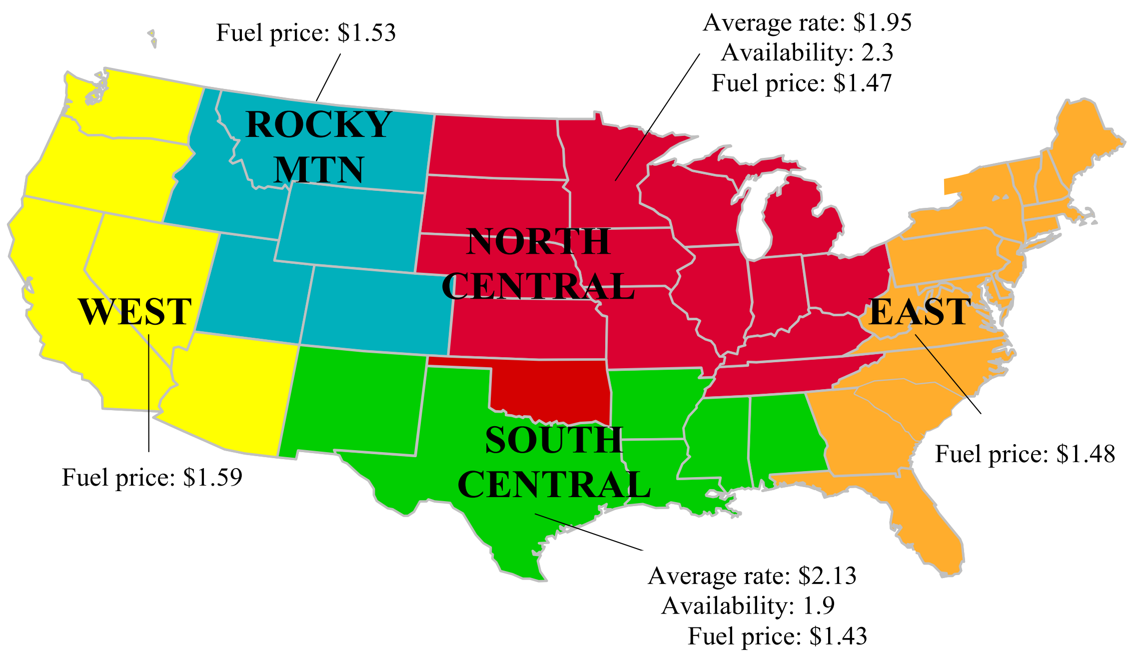
Week ending 04/10/04	Corn	Wheat	Soybean	Total
Mississippi River				
Rock Island, IL (L15)	207	5	38	249
Winfield, MO (L25)	333	6	51	391
Alton, IL (L26)	465	19	104	589
Granite City, IL (L27)	454	14	102	570
Illinois River (L8)	140	13	42	194
Ohio River (L52)	44	16	12	72
Arkansas River (L1)	0	35	3	38
2004 YTD	6,485	725	1,865	9,332
2003 YTD	7,296	525	3,086	11,254
2004 as % of 2003 YTD	89	138	60	83
Total 2003	29,898	2,787	9,146	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Truck Transportation

Figure 8
U.S. grain truck market advisory, 4th quarter 2003*



*Average rate per mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 11--U.S. truck market overview, 4th quarter 2003

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	Rate per mile			1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.58**	**1.72**	**1.56**	**2.2**	**3.2**	**2.7**
North Central region[2]	2.56	1.71	1.59	2.3	3.1	2.9
Corn	2.59	1.67	1.62	2.1	3.2	2.6
Wheat	2.30	1.66	1.52	2.7	2.8	2.9
Soybean	2.65	1.76	1.78	2.0	3.1	2.5
South Central region[2]	2.93	1.78	1.67	1.9	3.6	1.9
Corn	3.13	1.86	1.70	2.3	3.3	2.5
Wheat	2.81	1.77	1.67	1.6	3.6	1.6
Soybean	2.93	1.73	1.65	1.8	3.8	1.6

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 12--Retail on-highway diesel prices*, week ending 04/19/04 (US$/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	1.665	0.025	0.057
	New England	1.757	0.009	0.066
	Central Atlantic	1.742	0.021	0.038
	Lower Atlantic	1.624	0.028	0.065
II	Midwest	1.679	0.048	0.183
III	Gulf Coast	1.639	0.034	0.184
IV	Rocky Mountain	1.835	0.087	0.248
V	West Coast	2.112	0.086	0.487
	California	2.260	0.098	0.602
Total	U.S.	1.724	0.045	0.195

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 13--U.S. unshipped export balances (1,000 metric tons)

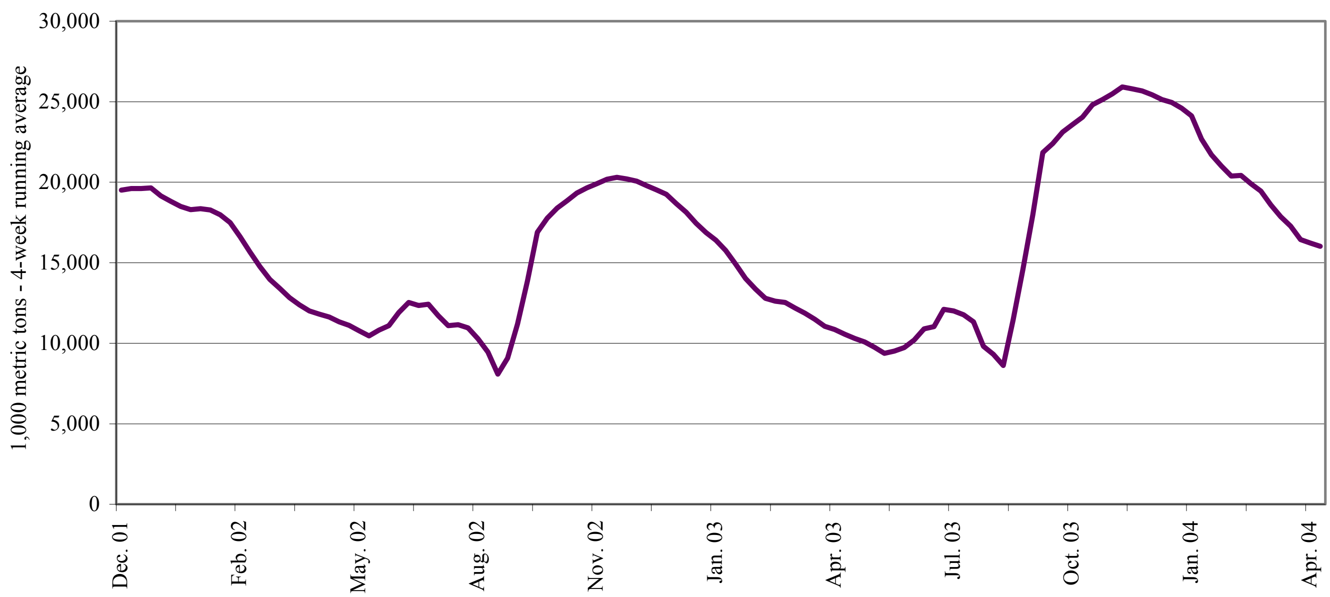
	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
4/8/2004	1,929	762	1,210	831	93	4,825	9,144	1,897	15,866
This week year ago	1,000	218	1,049	444	91	2,802	5,380	2,858	11,040
Commulative exports-crop year									
2003/04 YTD	11,055	3,235	5,732	4,259	940	25,220	30,019	21,832	77,071
2002/03 YTD	6,088	2,616	5,673	3,123	637	18,136	24,469	24,163	66,768
2003/04 as % of 2002/03	182	124	101	136	148	139	123	90	115
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231
2001/02 Total	8,704	5,485	5,554	3,127	1,133	24,003	47,460	29,838	101,301

Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balance, including wheat, corn, and soybean sales



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)

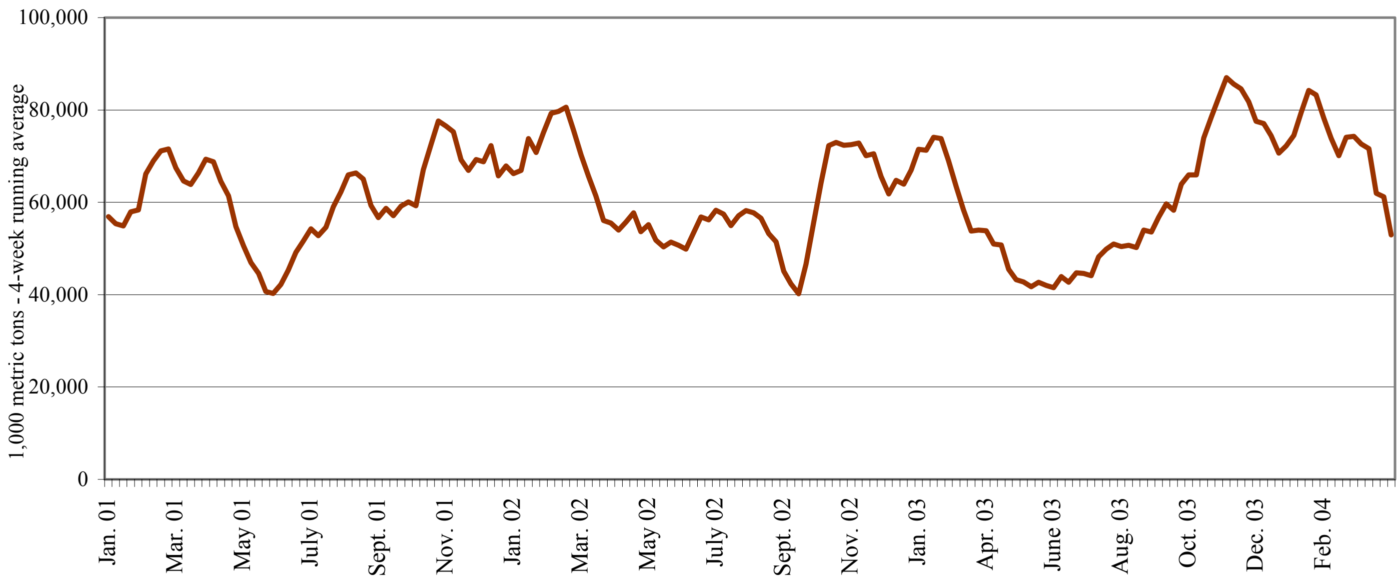
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
04/15/04	140	135	16	69	307	130	90	0	0	290	506	90
2004 YTD	3,481	3,115	1,639	2,192	10,467	5,204	3,256	44	7	8,235	17,863	3,307
2003 YTD	2,380	1,835	2,102	1,457	8,105	8,161	1,356	526	50	6,316	17,724	1,932
2004 as % of 2003	146	170	78	150	129	64	240	8	14	130	101	171
2003 Total	8,764	5,450	5,114	5,855	30,352	18,972	7,032	746	103	19,328	55,179	7,880

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export, including wheat, corn, and soybeans



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

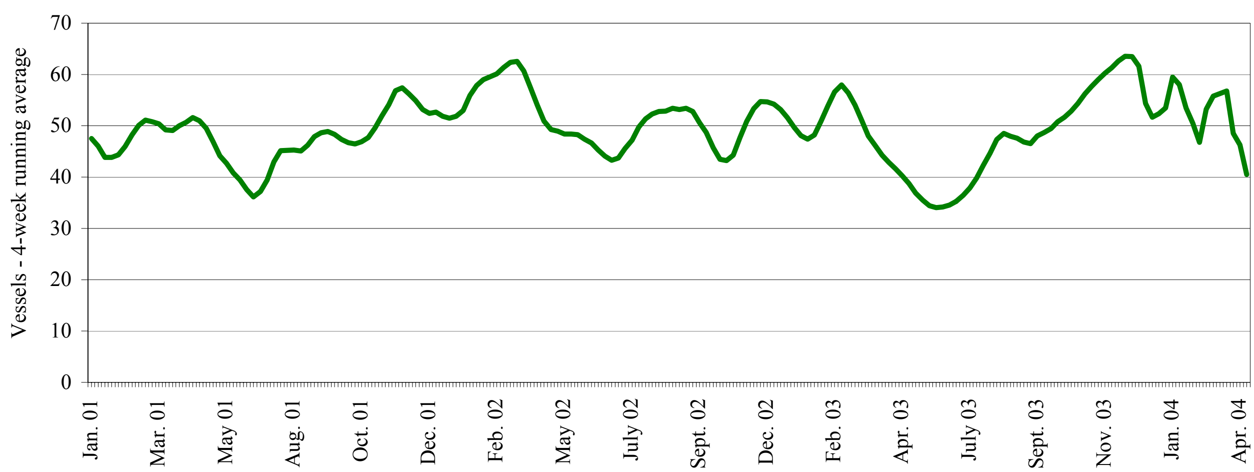
Table 15--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
4/15/2004	14	28	46	9	4
4/8/2004	20	47	43	8	0
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

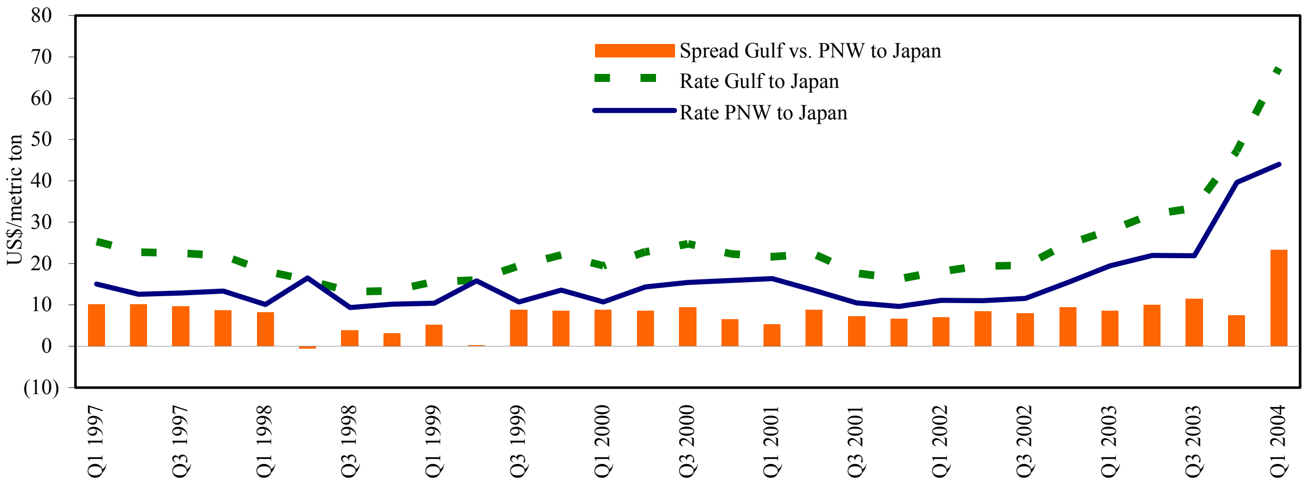
Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change	Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$73.75	$27.91	164	Japan	---	$19.43	---
Taiwan	$68.00	$26.50	157				
N. Europe	---	$14.50	---	**Argentina/Brazil to**			
N. Africa	$46.25	---	---	N. Africa	$61.17	$25.35	141
Med. Sea	$46.50	$14.50	221	Med. Sea	---	$25.35	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

Table 17--Ocean freight rates for selected shipments, week ending 04/17/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Tanzania*	Maize & Sorghums	Spot	38,870	104.90
U.S. Gulf	Turkey	Wheat	Apr. 15/25	55,000	52.00
PNW	S. Korea	Corn	Spot	38,000	76.75
U.S. Gulf	Jordan	Hvy grain	Apr. 15/25	50,000	66.50
U.S. Gulf	Albania*	Wheat	Apr. 1/10	9,000	106.34
St. Lawrence	Morocco	Wheat	Apr. 10/20	21,000	45.00
Spain	Venezuela	Wheatflour Bggd	Apr. 1/10	4,800	59.50
River plate	Algeria	Corn	Apr. 5/10	24,000	62.25
River plate	Tunisia	Grains	Mar. 10/20	22,000	72.00
River plate	Adriatic	Grains	Apr. 10/20	50,000	62.50
River plate	China	Grains	Apr. 15/20	55,000	87.50

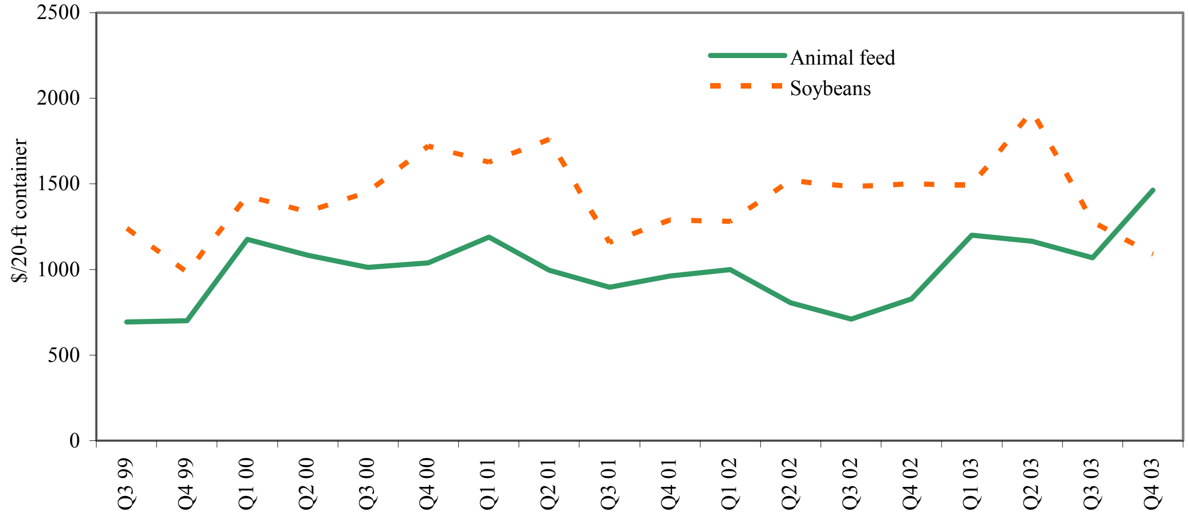
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



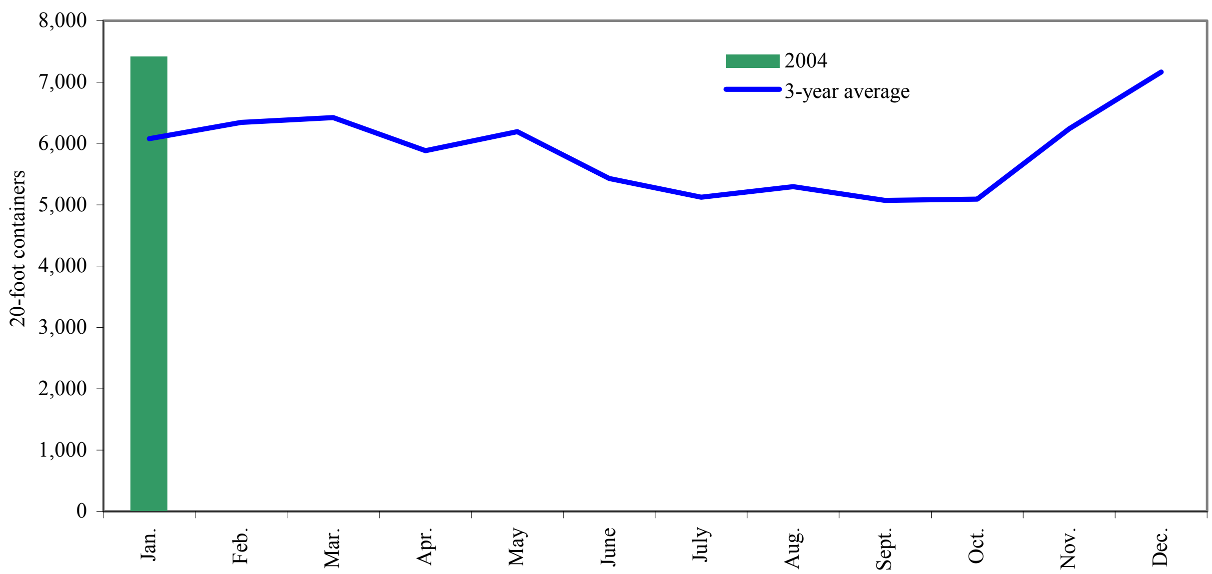
[1]Animal Feed: Bangkok-Thailand (4%), Busan-Korea (24%), Hong Kong (14%), Keelung-Taiwan (14%), Tokyo-Japan (44%), and soybeans: Bangkok-Thailand (3%), Busan-Korea (7%), Hong Kong (1%), Keelung-Taiwan (24%), Tokyo-Japan (65%) January-December 2003.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce* , January 2004

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Related Websites

Agricultural Container Indicators – a Quarterly Report http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin http://www.ams.usda.gov/tmd/Ocean/index.asp